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THE UNIVERSITY OF ALBERTA

RESIDENTIAL MOBILITY VERSUS STABILITY: MOVING INTENTIONS OF A SELECT GROUP OF OLDER RURAL ALBERTANS

by

© GRETCHEN BRUNDIN

A THESIS
SUBMITTED TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH
IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE
OF MASTER OF SCIENCE
IN
FAMILY STUDIES

FACULTY OF HOME ECONOMICS

EDMONTON, ALBERTA
FALL, 1980

THE UNIVERSITY OF ALBERTA

FACULTY OF GRADUATE STUDIES AND RESEARCH

The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research, for acceptance, a thesis entitled RESIDENTIAL MOBILITY VERSUS STABILITY: MOVING INTENTIONS OF A SELECT GROUP OF OLDER RURAL ALBERTANS submitted by GRETCHEN PAULI BRUNDIN in partial fulfilment of the requirements for the degree of MASTER OF SCIENCE in FAMILY STUDIES.

Norah Keating
Supervisor

Judith W. Marshall

Date October 14, 1980

in memory of my father

William J. Pauli

whose curiosity about the world and love of learning
have always served as inspirations.

ABSTRACT

A pilot project on the process of retirement provided the opportunity to study certain aspects of the moving activities of a particularly low mobile group of older people: rural, self-employed couples. The purpose of this study was to determine the extent to which intentions regarding a change in residence were related to developmental tasks of later stages of the life cycle.

The group under study consisted of 25 farm couples and 25 small business operators. The men were between the ages of 50 and 70; about half had retired. All couples had children and the families were identified as being in the "contracting" phase of the family life cycle. Couples were interviewed concurrently but separately. In addition to questions related to moving intentions, the interview schedule included sections on resources (money, time, housing and health), relationships (with spouse, children and other elements of the social network) and selected demographic variables.

The author predicted that changes in structure and function that occur in the later stages of the family life cycle would influence older couples to consider a change in residence. Specific factors expected to influence

consideration of moving were presence of children in the home, contact with children, occupation, retirement status, health status, satisfaction with one's residence and availability and importance of social networks. Gamma was used to measure these relationships. Another prediction was that reasons for considering a future move would vary by occupation (farm/business). Consideration of moving was found to be positively associated with having children still at home and being preretired. There was no significant difference with regard to reasons for considering moving based on occupation (farm/business).

The desire to be near one's adult children was seen as a factor in deterring moving activity and in determining the location of any new residence. Farmers were more likely to carry through the decision-making process regarding a prospective move than were business operators. As well, retirement was more often cited by farmers as a reason for moving. Although the group expressed a great deal of satisfaction with their present housing situations, over half had considered moving. The most frequent reason for considering a future move by both farm and non-farm groups was fear of failing health or physical incapacitation.

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CHAPTER I

NATURE OF THE RESEARCH PROBLEM

Introduction

Decisions about housing and its location may represent the greatest financial investment a family makes in its lifetime (Leeds, 1974; Gallogly, 1974). As age increases and participation in occupational and other economic activities decreases, the context of the household and neighborhood assumes even greater importance in terms of time and energy resources (Montgomery, 1972; Duvall, 1977). Next to the spouse, the housing environment has been characterized as the single most important element in the life of an older person (Carp, 1976:244).

Yet North America has a highly residentially mobile society. Despite the high financial and intrinsic values placed on one's home, individuals and families move with astonishing frequency. Government agencies estimate over 45% of the Canadian and United States populations move every five years (Statistics Canada, 1978; U.S. Census, 1975).

The incidence of mobility has been found to be closely related to the family life cycle stages (Goldscheider, 1966; McCarthy, 1976; Rossi, 1955; Yee and Van Arsdol, 1977). The most highly mobile are young adults;

as many as 80% may change residence in a five-year period (Statistics Canada, 1978; U.S. Census, 1975). The least mobile element is the older segment of the population, those 50 years and above. But even the incidence of mobility of this older group is noteworthy: 10% to 15% move over a one-year period while as many as 30% move over a five-year period (Statistics Canada, 1978; U.S. Census, 1975). An even greater proportion, 50% to 60% have considered moving at some time (Goldscheider, 1966; Nelson and Winter, 1975).

Census data and similar broad-based studies have been used by researchers to give a picture of those individuals and families who are apt to move and those who are apt not to move. Certain characteristics are associated with low residential mobility. Being older, residing in a rural area, having a minimal level of education, being part of a family, and participating in certain occupations such as farming or operating a business are associated with low mobility rates (Stone, 1978, 1979; Goldscheider, 1965; Goldstein, 1967; Lansing and Mueller, 1967; Bultena and Wood, 1969). The influence of income on mobility is inconclusive. Both low income levels as well as high income levels have been positively associated with moving activity by older people (Fernandez and Dillman, 1979; Goldscheider, 1965; Lenzer, 1966; Barsby and Cox, 1975).

Much of the work on residential mobility has been focussed on who moved, where they moved, and when they moved. Kevin McCraken (1973) suggested these types of studies examined the results of mobility without really studying the nature of the activity. A number of investigators (Brown and Moore, 1971; Boyce, 1971; Stone, 1971) have observed that the dynamics of mobility could be better understood by studying individual decision-making with regard to a prospective move.

Changes in structure and function of the family over its life cycle are influential in decisions about moving as a response to changing housing needs and expectations (Morris and Winter, 1975, 1978; Pickvance, 1974; Spear, 1974; Yee and Van Arsdol, 1977). Housing needs and expectations change as patterns of family life change. Therefore characteristics of those who consider moving and the reasons they give for leaving one home and selecting another are not necessarily the same for older people as they are for younger ones (Lenzer, 1965; Goldscheider, 1966). Montgomery (1972) noted that for older people, the reasons for remaining in their homes may be as important as the reasons for moving.

Few studies that have been concerned with the moving activities of older people have specifically considered how life cycle changes may affect decisions regarding a change in residence (Yee and Van Arsdol, 1977). Even fewer have attempted to elicit the reasons older people give for engaging in moving activities (Cleland, 1965; Goldscheider, 1966; McCarthy, 1976).

Statement of the Problem

What then does prompt older individuals or families from a relatively low mobility group to make decisions concerning a change in residence? This research is concerned with one such group: older, rural Alberta couples. The purpose of this research was to determine the extent to which intentions regarding a change in residence were related to factors associated with later stages of the life cycle. This researcher further sought to determine if the reasons given by this group for considering a future move reflected those changes that occur in later life.

A pilot study on the process of retirement conducted by Professors Norah Keating and Judith Marshall (1980) of the University of Alberta had as its focus older rural couples, who at the time of the study, were or had been self-employed, either as farmers or as small business operators. This project offered the opportunity to study the moving activities of this little-researched and low-mobile group.

Justification of the Study

One goal of research on moving activities has been to develop predictive theories of residential mobility. The proper locating of institutions, housing, and service centres is dependent upon accurate information concerning mobility patterns (Rossi, 1955; Simmons, 1974). But we know relatively little about the moving patterns of older people or the reasons that lie behind these patterns (Barsby and Cox, 1975). This is particularly true of rural populations (Schwarzweller, 1979). Rational planning for services to older people is dependent on knowledge about who they are and where and why they move (Wiseman and Virden, 1977). Since little is understood about the conditions under which older rural people might consider a move as a way of responding to changing needs and expectations regarding housing, it is hoped that this exploratory study dealing with one aspect of the decision-making process regarding moving will add to the present body of information on why families move and suggest areas for further study.

CHAPTER II

CONCEPTUALIZATION

Introduction

Both the family as a unit as well as its individual members can be studied from different viewpoints or frameworks, each of which enables the researcher to focus on a particular aspect of family life. The questions posed, the data to be collected, and the interpretation of that data are shaped by the selection of a particular framework.

A number of frameworks are currently employed for conducting research on the family. The family has been studied as an institution in the larger society, as a social system with boundaries and rules to be maintained, and as an interactional unit where the focus is on the internal workings of the family. In the present research, however, the author was concerned both with a particular problem, decision-making involving a possible change of residence, and with a particular time phase of couples in their family careers--the later stages of their married lives.

The developmental framework was most applicable to this study. Focussed on process and change in the family as it proceeds through its life cycle, this framework is concerned both with the family's dealings with outside systems and with the internal workings of the family unit (Levande, 1975). As the structure and functions of the family change over time, so do its needs and expectations. The developmental approach has proven useful in determining how these changing needs and expectations affect decision-making in family problem situations in areas such as housing, money management, and use of time (Hill, 1970; Morris and Winter, 1975; Segalen, 1974).

Developmental Framework

Central to the developmental approach is the concept of a family life cycle in which the family history is broken down into successive stages. Evelyn Duvall (1977), one of the leading proponents of the developmental approach, stated that a longitudinal picture of family life can be obtained by using the family life cycle as a frame of reference. She and other developmentalists such as Aldous (1978), Hill (1964, 1965, 1970), and Rodgers (1973) contended that all families have successive phases and patterns that occur from creation of the family unit to its end by death or dissolution. The developmental approach, while recognizing that each family is unique, lays stress on the commonality of patterns and behaviors that families demonstrate as they progress through their life cycles (Rodgers, 1973).

Life cycle stages then are based not on chronological blocks of time but on periods of "social process" time during which families experience a similarity of structure and function (Neugarten, 1976; Rodgers, 1977). Normative events such as marriage, the birth of a child, and retirement create changes in structure and function, thereby ushering in new phases of family life. Phases in which a family has pre-school children, or adolescent children, or in which the couple is alone in retirement are examples of social time periods that may form the basis for life cycle stages.

Families have certain basic tasks to perform which continue throughout their lives. These include physical maintenance of the family unit, the socialization of its members, and the management of family functions with relation to the larger society (Aldous, 1978; Duvall, 1977). Developmental tasks must be completed at each stage in the family life cycle (Duvall, 1977:177). They are based both on the biological needs and capabilities of the family and on the cultural expectations of society (Duvall, 1977).

As they change in structure and function throughout the life cycle, families also encounter stage-critical developmental tasks. Adjusting to a newly-married state or adjusting to retirement are examples of such tasks. Meeting these stage-critical developmental tasks may also require adjustments to the family's needs and expectations regarding the basic developmental tasks.

One of the basic family developmental tasks is the provision of satisfactory living arrangements (Aldous, 1978; Duvall, 1977). Needs and expectations regarding this basic function of the family are modified by the changes in structure and function that are associated with the various developmental stages and developmental tasks. This researcher is concerned with whether those in later stages of the life cycle consider moving as a way of meeting changing housing needs and expectations. In the following section this later period in a family's life is discussed in terms of the issues inherent in the resolution of the task of provision of satisfactory living arrangements.

"Contracting" Phase of the Family Life Cycle

Couples in this study belong to what has been termed the "contracting" phase of family life. The major structural change in the family during this phase is associated with the launching of children whereby the family unit is reduced in size. Changes in function include both loss of some of the parenting role and loss of the work role. Other changes in the functioning of the family are based on the physical aging process which may become a factor during this period. Two significant developmental tasks, the launching of children and adjustment to retirement, are based on cultural norms and expectations, while the third task, adjustment to the aging process, is based largely on biological needs.

A general expectation by society for all married couples is for independent living arrangements (Carp, 1976; Glick, 1979;

Two life cycle trends in the provision of shelter can be noted. First, the incidence of residential mobility declines throughout the life cycle (Stone, 1978; U.S. Census, 1975). Second, the percentage of people who own their own homes increases throughout their married lives (Statistics Canada, 1979). These trends are reflected in a rather stable resident population in the early part of the "contracting" family phase.

Activities and additional tasks associated with the changes in structure and function have implications for decisions about housing arrangements. When the children depart from home, the size and design of the dwelling and its location may no longer suit the needs of the couple.

Duvall (1977) suggested continued contact with adult children is an important task during this period and maintaining a home base for children is helpful in achieving this task. The change in structure and accompanying loss of parental roles permits time, energy, and money to be directed into activities other than raising children. These resources may be directed toward enhancing the home environment or in the development of new interests and social bonds (Duvall, 1977; Atchley, 1977).

Loss of the work role through retirement may signal for some a break in existing attitudes and behaviors about their present residence. Having no job constraints, the couple is free to move if they so desire. A change in finances often accompanies retirement and housing adjustments may have to be made accordingly.

Finally, adjustment to aging involves changes in physical capabilities. Decreased energy level, lessening of visual and auditory acuity, and a reduction of physical strength--all may have a direct bearing on the ability to cope with one's present environment (Duvall, 1977; Gelwick and Newcomer, 1975; Gerontological Society, 1969: 39). Health problems associated with aging also become factors that affect a couple's housing arrangements. Yet providing for a satisfactory home situation is seen as a developmental task through all the contracting phase of a married couple's life (Duvall, 1977).

The ability of the developmental framework to deal with both the passage of time and with external and internal affairs of the family make it aptly suited for studying the process of decision-making. Decision-making, like any process, is a series of sequential actions which occur over time. Confrontation with a problem, deliberate thinking in a specified direction, choosing among alternate courses of action, and making overt responses are elements im the decision-making process (Golledge, 1969).

Researchers have demonstrated that changes in family structure and function over time contribute to the antecedent needs and expectations that affect decision-making whether that decision has to do with a prospective move or some other aspect of family life (Hill, 1970, 1975; Lansing and Kirsh, 1957; Miller, 1976; Pickvance, 1974). Making satisfactory housing arrangements throughout the life cycle requires that certain decisions be made by individuals or families. Following is a discussion of how decision-making regarding a change of residence is one way of meeting housing needs and expectations.

Decision-Making Regarding a Change in Residence

For the last 25 years, a number of studies have used life cycle explanatory models in studying how families make decisions regarding changes in residence (Pickvance, 1974; Rossi, 1955; Speare, 1970; Yee and Van Arsdol, 1977). Morris and Winter (1975, 1978) have postulated that the family continually evaluates its housing situation. They see the evaluation procedure as a problem-solving process, involving complex decision-making at different stages (Morris and Winter, 1978:50).

A family's changing needs and expectations regarding housing are based on its progression through the family life cycle. As the structure and function of the family change, its housing arrangements are expected to meet certain cultural, family and individual norms appropriate to each stage of family life. If these norms are met, a family will perceive no discrepancy between its present housing arrangements and its needs and expectations for housing . Thus the family will be satisfied with the existing arrangement. This step is generally an unconscious one and there are no further decisions to be made at this time (Morris and Winter, 1975:84).

According to Morris and Winter (1978) when there is a gap between the actual housing situation and needs and expectations, a feeling of dissatisfaction occurs. The family then employs its financial, emotional and psychological resources to reduce this feeling of dissatisfaction and to obtain a housing situation that does neet its current needs and expectations. Morris and Winter (1975, 1978) have used the word "housing" in a global sense, noting that various aspects of dwelling and neighborhood contribute to the overall feeling of satisfaction or dissatisfaction with one's residence.

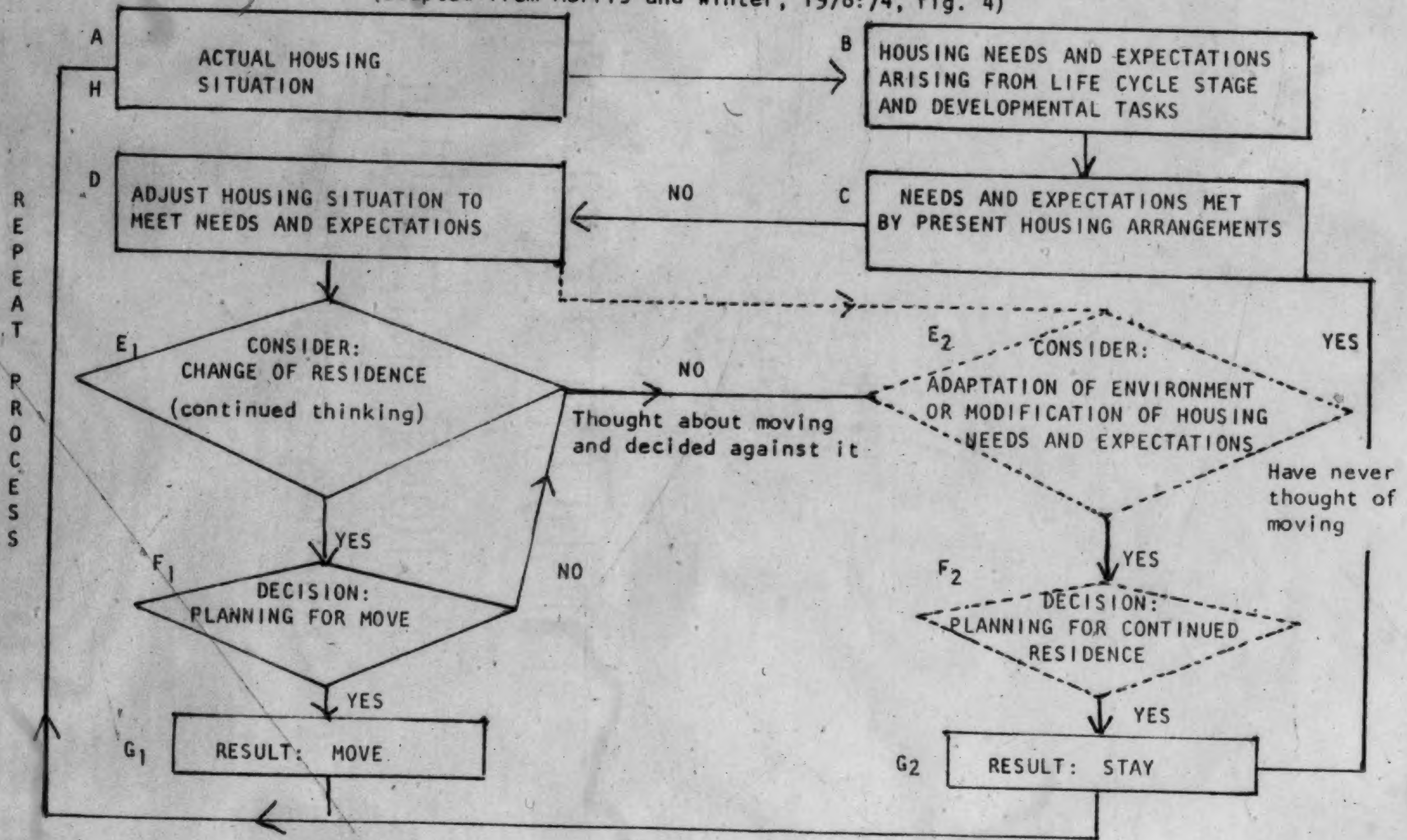
Several researchers (Brown and Moore, 1971; Morris and Winter (1975, 1978; Speare, 1974) have developed similar models which illustrate behavioral responses of individuals or families undertaken as a means of adjusting to changing housing needs. In Morris and Winter's (1978: 74, figure 4) model, behavioral responses include moving to another residence or remodeling the existing residence. If there are constraints on these means of adjustment, the family will either change its expectation regarding housing or change the family composition or organization to fit the existing housing situation (Morris and Winter, 1978: 74-79). These researchers suggested a hierarchy of possible adjustment behavior whereby a change of residence is most likely to be considered first. They also maintained that housing adjustment behavior is similar across all age groups.

The current study was focussed on but one of the behavioral responses to housing adjustment that can be utilized by older families, that of a change of residence. To depict the narrower focus of this research, an adaptation was developed of Morris and Winter's (1978:74) model of a family's housing adjustment and adaptation process (see figure 1, page 16). The new model provides an outline of the process involved in the continuous evaluation of housing with a change of residence as a method of possible adjustment. For this present study all forms of adjustment other than a change of residence have been combined (E_2 and F_2), since they were not a feature of this study. Of particular interest to this research is Condition B (Housing Needs and Expectations Arising from Life Cycle Stage and Developmental Tasks) since the purpose was to assess the relationship of factors associated with later life cycle stage changes and consideration of moving.

Families respond to motivation factors which may cause them to consider a change of residence with varying degrees of commitment (Duncan and Newman, 1974; Rossi, 1965). Although Morris and Winter's (1978:74) flow chart of housing adjustment did show that the decision-making process is a series of sequential stages with different decision-making points, they did not attempt to specify the particular responses which could be involved. As part of the purpose of this research was to determine the extent to which these older couples had considered moving, their varying intentions regarding a potential change of residence have been incorporated into the model (see figure 1, page 16).

MODEL OF FAMILY'S CONTINUED EVALUATION OF THEIR HOUSING NEEDS AND EXPECTATIONS:

CHANGE OF RESIDENCE AS METHOD OF ADJUSTMENT
(adapted from Morris and Winter, 1978:74, fig. 4)


A
H
ACTUAL HOUSING SITUATION
B
HOUSING NEEDS AND EXPECTATIONS ARISING FROM LIFE CYCLE STAGE AND DEVELOPMENTAL TASKS
C
NEEDS AND EXPECTATIONS MET BY PRESENT HOUSING ARRANGEMENTS
NO
D
ADJUST HOUSING SITUATION TO MEET NEEDS AND EXPECTATIONS
YES
E1
CONSIDER: CHANGE OF RESIDENCE (continued thinking)
NO
Thought about moving and decided against it
E2
CONSIDER: ADAPTATION OF ENVIRONMENT OR MODIFICATION OF HOUSING NEEDS AND EXPECTATIONS
Have never thought of moving
YES
F1
DECISION: PLANNING FOR MOVE
NO
YES
F2
DECISION: PLANNING FOR CONTINUED RESIDENCE
YES
G1
RESULT: MOVE
G2
RESULT: STAY
REPEAT PROCESS

CHAPTER III

SURVEY OF RELEVANT LITERATURE

Introduction

The focus of this thesis is on older people who have considered moving as their method of adjusting to different sets of housing needs and expectations which have resulted from changes in structure and function over the family life cycle. A study of the family developmental life cycle would seem to suggest that these changes which occur in the "contracting" phase are related to the departure of children from the home, retirement, and the aging of the couple. This survey of literature is focussed on these three factors and the current state of knowledge about how they influence moving activity.

Influence of Children

Presence of children. The major structural change of the contracting family is the departure of children from the family home. Analysis of census data (Long, 1973; Stone, 1978) indicated that the presence of school age children restricted mobility at every age level of the head of the family. An examination of two large scale studies, Yee and Van Arsdol (1977) and McCarthy (1976) showed that there is a rise in the incidence of mobility as the children leave home. McCarthy reported the mobility rates of over 3,000 householders in varying stages of the life cycle. Those that McCarthy characterized as older couples with no children experienced a higher rate of mobility than those characterized as older couples with older children.

A detailed analysis of both planned and subsequent moves over the life cycle was presented by Yee and Van Arsdol (1977). Based on a large California sample, their presentation indicated a decrease in moving activity over the life cycle with certain notable exceptions. A rise in moving activity was noted around age 51. The authors suggested this rise was associated with the launching of children.

McCarthy (1976) also reported various reasons householders have for moving. Older couples with no children cited two reasons with equal frequency: "change in family circumstances" and "wanted change in space or quality." He suggested there was an overlap between these two categories. The desire for features pertaining to space and quality of the residence was, in fact, due to life cycle changes. When Duncan and Newman (1975) analyzed the data from a five-year panel study involving families in various stages of the life cycle, they also found net declines in family size were associated with a change in residence. It would appear that the departure of children from the home stimulates a couple to consider a move as a way of accomodating their altered space requirements.

However, in practice, more families plan to move than actually complete a move. Yee and Van Arsdol (1977) reported from their analysis that those aged 45 to 55, the period the authors associated with child launching, have less probability of carrying out their plans to move. These researchers speculated that the marriage of the last child is sometimes followed by cancellation of moving plans. Peter Rossi (1955) and Duncan and Newman (1975), noted it was easier to adjust to a surplus of space than to a deficit. Therefore, although departure of children may motivate a couple to consider moving, it also may not be enough cause for them to formulate concrete plans to move.

Sherman, Mangum, Dodd, and Winter (1968) found that of 600 in-movers to various types of retirement accomodations, substantial numbers of the new residents had no children. This suggested to these researchers that lack of kinship and social ties in the previous environment prompted older people to seek new housing arrangements. Perhaps, then, it is not the mere presence or absence of children in the home that is important but the role they play as a part of older people's social network.

Contact with children. Duvall (1977) has said that maintenance of contact with adult children is an important task of the family. In fact, children do leave over a period of time, returning with enough frequency to suggest that the existing home base is still valued by children as a way of preserving continuity (Black, 1976; Duvall, 1977).

An eximination of several studies pointed out that older people undertake some moves for what are termed "family reasons" (Cleland, 1965; Lansing and Mueller, 1967; Lenzer, 1965). Unfortunately these studies did not specify whether children were the "family reasons" nor whether the move was undertaken to facilitate intergenerational contact.

One study did convey the importance of contact with children as being instrumental in moves of older people. A study was made of older in-movers to a North Dakota farm community (Cleland, 1965). These new residents were, for the most part, former residents from within the immediate community or from homes or farms within fifteen miles. One of the most important reasons movers offered for their change in residence was the desire to be near children or other relatives.

If maintaining contact with adult children is important, this indeed may be an important factor in the decision to move or to remain in one's present location. Shanas (1977) found that in reality older people do have contact with their children. She reported that 90% of those who had children saw at least one child the preceding week. Therefore, for many older people, a change in residence would not be necessary to maintain high levels of contact with their children.

Summary. Older people who still have children at home will likely not consider a change in residence until the children actually begin to leave home. At that point other housing arrangements may be considered but many couples will change their minds before plans are undertaken in earnest. Maintaining contact with adult children is important and also has been cited as a reason for moving on the part of some older people. One would expect that those older people who have frequent contact with their adult children will be less likely to consider a change in residence.

Change in Work Status

Moving activity associated with retirement. In North American society another significant change that occurs during the later stages of the life cycle is retirement from the work role. Sidney Goldstein (1967) in his study of older people in the labor force noted that retirement seemed to facilitate moving. Certainly one of the findings of Barsby and Cox (1965) was that continued participation in the labor force by older people did inhibit mobility. When Lenzer (1965) analyzed U.S. Census data he noted that most moving activity on the part of older people was of the unemployed, followed by those older people who were retired. The least mobile were those older persons who were employed.

Goldstein (1967) also determined that participants in certain occupations had a tendency to continue their work roles for longer periods of time. Farmers, managers, proprietors, and skilled craftsmen remained in the work force the longest. For men age 50 and older, labor force participation is the highest among the rural farm population (Bauder and Doerfinger, 1967:24-25). Farmers and self-employed businessmen have no set time for retirement and if a continued work role is a deterrent to mobility, one would expect fewer moves on the part of these people. In fact, when Lansing and Mueller (1967) studied the geographic mobility of the labor force across the United States, they reported that farmers, before retirement, did experience less mobility than those in professional and managerial occupations.

Timing of moves. Little has been written about the specific time of moves undertaken in the later stages on the life cycle. What relationship does the occurrence of a specific event such as retirement play in both planning and executing a move? When Goldstein (1967) described the migratory behavior of older people who were working or could work, he commented that geographic "retirement mobility" occurred most frequently two to five years following exit from the work role. Goldstein speculated that a short interval followed retirement in which decisions and arrangements were made with respect to a change of residence.

Researchers Yee and Van Arsdol (1977) reported somewhat different findings with regard to the timing of moves in relation to retirement. In a study of the desired, planned and actual mobility of a sample of 1,000 households, Yee and Van Arsdol found a rise in both planned and subsequent mobility between the ages of 59 and 62. The authors did not report a mean age of retirement for this sample, but if retirement occurred at about the age of 65, the majority of moving activity would precede retirement. In fact, they suggested that this reflected effectively-planned-for retirement. Yee and Van Arsdol's sample was a California urban/suburban group which presumably was composed of those involved in a variety of occupations. If the self-employed do tend to retire later as Goldstein (1967) suggested, and if the timing of moving activity is largely associated with retirement, one might speculate that farmers and other self-employed would be more apt to consider a change of residence at a later point in their life cycles than would most older people.

Factors related to the nature of the occupation. Leroy Stone (1979), analyzing the occupational composition of Canadian migrants, recognized that there were certain occupations such as the self-employed whose participants were apt to be tied to their home communities by virtue of their dependence on a clientele whose loyalty was established over time. In fact, when John Goodman (1974:84-5), examined the residential mobility data of 3,000 participants in a five-year panel study, he did find that both farmers and self-employed business owners had relatively low mobility rates.

Many business owners, especially those in smaller communities, actively participate in community life, thereby strengthening their feelings of attachment to the community. Community attachment, as measured by community identification and community satisfaction, was found to have a negative effect on residential mobility (Fernandez and Dillman, 1979).

When Morris and Winter (1975) described their model of family housing adjustment over the life cycle, they predicted that the first response to a family's dissatisfaction with its housing situation would be to consider moving. However they qualified their prediction by stating that farm families would be much less likely to adjust their housing needs by considering a change in residence (p. 85). Farmers face a perhaps unique situation upon retirement. There is no other employment category where a family's home is so intimately tied to the place of business. Retirement, which includes the sale of the farm, may involve the family residence as well (Bauder and Doerflinger, 1967). Perhaps retirement is a determinant of moving activity on the part of farm families more than it is for most older people.

Farmers and others who operate their own businesses have a large financial investment in their operation which is a deterrent to moving activities (Stone, 1979; Barsby and Cox, 1975). Retirement may also bring a substantial increase in income through the sale of their enterprises (Keating and Marshall, 1980). For these self-employed who retire, a change in residence may be undertaken at this time as a way of realizing increased expectations with regard to housing. Since the funds are now available to improve the existing residence which may now be in need of attention, the couple may elect to adjust their housing needs in this fashion. Thus, rather than determining if the couple should or must move upon retirement, the financial situations of many self-employed may allow them to fulfill any plans they may make regarding housing arrangements.

Spatial context of moves. The event of retirement appears to have implications with respect to the distance individuals and families consider moving. Goldstein (1967) found that moves of greater distance occurred within the period two years preceding retirement and five years after retirement. Golant (1972, 1977) examined the spatial context of older movers in both Canada and the United States. The vast majority of moves occurred within the same county.

Inter-provincial moves, like inter-state moves, were low in frequency. However, those over 65 years of age demonstrated a greater proportion of inter-provincial moves than the group aged 60 to 64. Golant (1972, 1977) attributed this to mobility associated with retirement and the loss of the work role. He further suggested this offered some credence to popular press stories and to those research studies which had intimated there was definite migration activity that occurred with the onset of retirement.

Leroy Stone (1979) has stated that long-term association with an area such as is experienced by farmers may have implications in terms of the distances retirees move. A large-scale study focussing on retirement in Alberta (Retirement in Alberta, 1976) reported that fewer rural pre-retirees planned to move to an area without friends or family than did urban pre-retirees. The implication was that moves undertaken by rural pre-retirees were apt to be within their home areas. Bultena and Wood (1969) found that rural people moved less frequently and also engaged in moves of shorter distances.

The desire to remain in the general area of one's work life was expressed by interviewees from Cleland's (1965) study of older in-movers to a farm community. The newly moved residents, for the most part former residents from areas within a few miles' radius of the town, identified the desire to be within their "home community" as the principle reason for moving into town. An additional twenty percent articulated that the desire to be near their property or other business interests was the motivating factor in the move. Cleland's study did not report whether this desire was based on emotional attachment to the property or to a continued financial investment in the operation.

Although officially "retired," a continued financial or family interest in their property would exert a stabilizing effect in terms of the potential distance of a move by older farm families. It is possible that operators of businesses may face the same situation. If children do take over the farm or business, many couples understandably wish to remain available for assistance, thus restricting the spatial context of any move they may consider.

Summary. Several points pertaining to the effect of retirement on residential mobility may be noted. Much of the moving activity on the part of older people seems to be associated with the event of retirement. Moves associated with retirement may be more of an issue for farmers than for business owners due to the interrelatedness of work and home for farmers. Sale of the farm may mean vacating the family home as well.

Although the sale of property or business may permit the purchase of a home better suited to the newly retired couple's life style, most moves undertaken by the rural self-employed are apt to be in their home districts. This may be particularly true for farmers who have not only retained an emotional attachment to their land but have some likelihood of a continued financial or family interest in the farm enterprise.

Issues Related to the Aging Process

Age is a basic component of life-cycle stages (Yee and Van Arsdol, 1977), and as such, has been used as a means of predicting changes in mobility patterns over the life cycle. The general decline, over the life cycle, in the occurrence of moves that are planned and moves that are eventually completed has been discussed already. Noted as well were certain increases in the incidence of mobility that have occurred in later stages of the life cycle. Researchers have speculated that these rises are associated with launching of children and with loss of the work role. One other rise toward the end of the seventh decade of life has been loosely attributed to the effects of aging (Gollant, 1972, 1977).

A subcommittee of the Gerontological Society (1969:39-40) characterized the problems of aging and living arrangements in terms of the interaction of changes which occur in the individual and in his or her environment. The relative degree of satisfaction an older person has with his or her environmental setting as well as with physical capabilities affects his or her perception of how effectively the housing situation neets needs and expectations.

Satisfaction with location. Satisfaction with one's residence and community has been cited as a deterrent to residential mobility (Fernandez and Dillman, 1979; McCarthy, 1976; Nelson and Winter, 1975; Speare, 1974). Hynson (1975) surveyed over three hundred individuals, sixty years of age and over, from both urban and rural settings. More rural elderly than urban elderly expressed feelings of satisfaction with their communities and with their general levels of happiness. Montgomery (1967:177) reported that older rural people were generally well satisfied with both their dwellings and neighborhoods.

Morris and Winter (1978) commented that housing satisfaction is consistently reported highest among the elderly. They offered two possible interpretations. One is that the elderly have achieved their desired housing arrangements and therefore, are satisfied. Another interpretation is that housing satisfaction is realistically expressed in terms of the constraints that exist (p. 212). Many factors contribute to an older family's feelings of satisfaction with its location. Home ownership, increased opportunity to live independently, reluctance to change existing patterns of living, and contact with a supportive social network are factors that promote residential stability on the part of older people.

Approximately eighty percent of rural Albertans own their own homes (Englemann, Howell, and Harper, 1977). A house is a fixed asset, confining a person to one spot, thereby restricting mobility (Barsby and Cox, 1975:11). In fact, home ownership exerts one of the strongest negative effects on moving intentions (Goldscheider, 1965; Lansing and Mueller, 1965; McCarthy, 1976; Wiseman and Virden, 1977). Associated with this high degree of home ownership is a significant financial investment. Eighty percent of older homeowners in Canada have clear titles to their homes (Leeds, 1973; Statistics Canada, 1979). That financial commitment is an incentive for couples to remain in their present locations.

Better health care and increased longevity as well as modern housekeeping aids allow older people to operate independently for longer periods of time in their existing residences. Some older families in North America have lived in their homes for 20 years or more (Atchley, 1977; Andrews, 1963; Golant, 1975). Long-term residence in one location also exerts a stabilizing effect on the propensity to move.

Both Vivrett (1960) and Lansing and Mueller (1967) have written about the difficulty most people have in initiating any activity regarding moving. It is easier to remain where one is, to maintain the status quo, than it is to move unless there are fairly strong "pushes" from the present housing situation and "pulls" toward a new housing arrangement. The unfamiliar may be threatening to older people. A study of retired Kansas farmers (Montgomery, 1967) classified a number of their dwellings as undesireable for older residents due to the physical condition of the house or its design. Yet few individuals considered moving. Montgomery (1967:178) speculated that this situation was related to the fear among these older people that a change in their housing arrangements would erode their independence. The problems of readjustment to a new place may appear to be insurmountable (Montgomery, 1976:39; Vivett, 1960). Patterns of living have already been established which contribute to a "sense of place." (Montgomery, 1976).

Satisfaction with and commitment to one's community is partially dependent upon the social network, an individual or family has developed and the importance these contacts have for them. An unwillingness to move by those over 65 has been related to social ties of family and friends as well as to other neighborhood and housing factors (Langsford, 1962:27). A study of local moves over a period of five years was part of a large scale project involving over 3,000 participants (Duncan and Newman, 1975). To test the effect of social ties on residential mobility, an index of family and social ties was developed with components relating location of family and relatives and involvement in school, community and church activities. High scores on this index were associated with lower actual mobility.

Physical changes and related health problems. Physical changes that occur in the individual during the aging process may be manifested in a decrease in energy level, a lessening of visual and auditory acuity and a reduction in physical strength (Gerontological Society, 1969:39-40). All of these factors may have a direct bearing on the ability to cope with one's environment (Gelwicks and Newcomer, 1974; Gerontological Society, 1969).

This general aging process can restrict manoeuverability, limiting access to services and social networks when they are most needed (Andrews, 1963; Gelwick and Newcomer, 1974). Many older people who have had automobiles become increasingly reluctant to drive, relying on other modes of transportation to obtain needed goods and services. The rural elderly have the additional problem of poor or nonexistant transportation services which further limit their potential social contacts. However, older rural people (who may have lived in the community for a long time), such as self-employed farmers and business owners, also may have built up strong social networks which provide both transportation when necessary and the physical and emotional support which would enable those older people to remain in their own homes.

Certain basic needs with regard to housing were expressed by 75 older people over age 62 who were interviewed in Nelson and Winter's (1975) study. The researchers found some negative association between satisfaction with the dwelling unit and consideration of moving. The concerns of these interviewees in this regard were with the size of the unit, adequate protection against intruders and ease of upkeep (p. 163).

Nelson and Winter (1975) were interested in determining if "disruptive life events" associated with aging were related to considerations of moving. These included events such as retirement, illness or disability of the respondent, or illness or death of a spouse or friend. A moderate association with consideration of moving was found with only one event--death of a close friend or relative.

The data from Goldscheider's (1966) sample of over three hundred older people did not indicate that health reasons were important considerations in moving. However, Lenzer (1965) analyzed data from two large-scale data bases, one U.S. Census reports and the other Lansing and Mueller's (1967) study of the geographic mobility of labor. Both of these reports included sections on reasons for moving. Reasons related to housing and health were both given as important influences in changing residences. The inconsistency between the reasons reported in

Goldscheider's study and those indicated in the two large surveys reported by Lenzer may be attributed to the ages of the samples. Goldscheider considered responses from those over 50, while the other two studies used age 65 as a base. Reasons for moving that involved issues of health or physical capabilities would appear to surface at fairly late ages.

Cleland's (1965) rural sample also featured an older population with age 65 as the base. Poor health and advancing age were cited as reasons for moving into the local community, but were not the primary reasons offered by these people. Identified as the chief reason for moving into the community was that it was their "home community." However, Cleland felt that reasons of health and advancing age lay behind this reason.

Summary. Many factors associated with aging tend to promote residential stability rather than residential mobility. Rural older families have a history of less frequent moves and express a greater amount of satisfaction with their location than do families in other locations. If indeed older rural families are more satisfied with their present housing situations, one would continue to expect less moving activity on the part of these people. Factors pertaining to an individual's physical condition and health status and which affect that person's ability to cope with his or her environment do seem to be issues in decisions made about housing arrangements. These issues are more likely to appear with those older people who are in their late sixties and older than in the earlier parts of the "contracting family" phase.

Summary and Predictions

Summary. Certain factors related to changes that occur in the later stages of the life cycle do seem to be influential in affecting moving intentions of older people. Children continue to play an important role in their parents" lives and as they leave home, parents may consider moving as a way of adjusting to changes in their housing requirements. The desire by parents to be located where they can continue to maintain frequent contact with their adult children might affect the mobility decisions of older individuals.

The event of retirement would seem to be one of the most significant factors in later life decisions to move. Retirement may have an even greater effect on the decision-making of persons in certain occupations such as farming, where home and work are interrelated. The effects of the aging process in terms of health and physical problems may encourage older people to change their residences to more supportive environments.

The negative effects of aging and their potential influence on housing decisions may be modified by the support systems in terms of family and friends that are available to the older family. There is little indication that the sex of the older person acts as a modifying force in any of these factors that may affect moving decisions (Lenzer, 1965; Nelson and Winter, 1975).

Predictions. Based on the review of literature relevant to the interests of this present research, the following predictions were made.

Extent of moving intentions:

1. Consideration of moving is related to the presence of children in the home, contact with children, occupation, retirement status, health status, satisfaction with one's residence, and availability and importance of social networks.
   1.1. Having children at home is positively associated with having considered moving.
   1.2. Reporting infrequent contact with children is positively associated with having considered moving.
   1.3. Belonging to the farm group is positively associated with having considered moving.
   1.4. Being "pre-retired" is positively associated with having considered moving.
   1.5. Reporting poor health is positively associated with having considered moving.
   1.6. Being dissatisfied with present housing arrangements is positively associated with having

considered moving.

1.7. Reporting the availability and importance of a social network of children and friends is negatively associated with having considered moving.

Reasons for moving:

2. Reasons given by individuals for considering a future move will vary by occupation (farm/business).

CHAPTER IV

RESEARCH DESIGN

In this chapter the study design is described. Information regarding the sampling, data collection procedure, instrumentation, and data analysis are presented. The selection of a sample and methods of investigation were designed to assess the relationship between the first dependent variable, moving intentions, and independent variables which were factors associated with changes that occur in later family life; and the second dependent variable, reasons for moving, and the independent variable, occupation.

Sampling

Criteria

This study on moving intentions was part of a larger research project devoted to an examination of the timing and nature of the process of retirement (Keating and Marshall, 1980). Thus the criteria of the sample for this thesis were determined by the requirements of this larger project which had as its focus older, self-employed, rural Alberta couples.

Two groups of the rural self-employed were surveyed.

One-half of the sample consisted of farm couples who received their major source of income from the farm operation. The other group was composed of those who operated their own small businesses. Each business operation could not employ more than 25 workers. The criteria for inclusion in this sample were as follows:

1. The couple had to be married, with the husband between the ages of fifty and seventy.
2. The husband's main job was or had been farming or running his own business.
3. The wife was not to have had a full-time job apart from the farm or family business. She could be or have been gainfully employed for up to ten hours weekly.

Age 50 is frequently used as a base for studies dealing with retirment or aging because it seems to signal the beginning of many important life events (Carp, 1976: 247). Age 50 has also been used as a base in studies of older people and their moving activities (Goldscheider, 1966).

Sample Description

The sample was composed of 49 older rural couples, 24 farm and 25 self-employed non-farm, and divided between pre-retired and retired persons. Table 1 summarizes the occupational and retirement status of the participants:

TABLE 1

Occupational and Retirement Status of the Participants

	Retirement Status		
Occupation	Pre-Retired	Retired	
Farm	30	18	48
Business	18	32	50
	48	50	98

A summary of pertinent demographic variables follows:

Age. The median age was 58, with a range from 43 to 72. The age range of the men, upon whom the criteria was based, was 49-70 with a median age of 62. Since there were more pre-retired farmers, the average age of the farm group was slightly younger than that of the non-farm group. Business operators either retired or expected to retire at a slightly younger age (62) than did the farm group (64). The retirement age of this sample is similar to that of other groups. This is contrary to findings that the self-employed tend to work until later ages (Goldstein, 1967). This has implications with respect to the age at which older people consider moving if retirement is a factor.

Education. As might be expected from a group where opportunities for schooling were limited in years past, participants had a fairly low level of education; 50% had less than grade nine and 85% less than high school.

Income. For purposes of the retirement study, income was reported in terms of gross income. In general, disposable income appeared to be higher than for most rural Albertans. What is of greater importance, however, is that there was no significant difference in pre-retirement and retirement income for either farm or non-farm participants. In fact, a number from both groups did report a rise in income upon retirement. Therefore, income would not act as a constraint on mobility intentions for this group.

Children. All couples had children. These families were in the stage of their family life cycle when their children were beginning to leave home. No family had an older child less than age 18. Seventy percent of the youngest children were 18 or older, so it is apparent that the couples in this sample were in the "contracting" phase of their life cycles.

Housing. All but one couple owned their own homes. Seventy-five precent no longer had mortgages. Of those individuals who reported discussing retirement with their spouses (n = 77), 22.1% cited "where to live" as being the focus of their discussions. Housing was the issue most discussed, along with the timing of retirement. Issues surrounding the location of their housing arrangements were, then, a concern of this group.

Sampling Limitations

This sample was carefully selected according to the specified criteria. This is accepted practice when the aim of the research is to obtain insight into the relationship between variables (Selltiz, Wrightman, and Cook, 1976:94). As with any study that does not use random selection of participants, care must be taken in generalizing to larger populations.

Another limitation of this study is that only those who lived and moved within a restricted area were interviewed. Like Cleland's (1965) study of a North Dakota farm community, those who have moved away were not interviewed. The factors that influenced their decisions to move may have been different from the influences on this group.

Instrumentation

Development of the Research Instrument

Retirement schedule. The research instrument, developed for the broader study of the process of retirement, was an interview schedule composed of both open and closed questions. The project directors developed two instruments for the retirement study, one for preretired individuals and the other for those who were retired. Questions were similar; the differences were primarily in working to distinguish between past and future planning. A copy of the pre-retired schedule is located in Appendix A. Both schedules included the following sections:

1. Demographic variables.
2. Timing of the process of retirement.
3. Planning concerning resources (money and capital, time, housing and health).
4. Planning concerning relationships with spouse, children and other elements of the social network.
5. Life satisfaction.

Housing section of retirement schedule. The section on housing was developed by this writer to obtain information about both housing and moving activities of this group. The decision was made to develop a new instrument for several reasons. The retirement project required some specific data about the kinds of housing options older people considered. For the purposes of this research, a measure of the extent of moving intentions was desired in order to obtain information relative to decision-making and housing adjustment. Second, this writer wished to gather data on the reasons individuals actually gave for considering a move as a means of determining if the reasons did reflect factors associated with changes in structure and function of the family unit in later life.

This section made use primarily of open-ended questions which were found to be more successful in obtaining the principle reasons householders gave for considering a move (Michelson et al, 1973; McCracken (1973). Those studies that provided some information on their instruments were closely examined for type of question, phrasing and arrangement.

The housing section of the interview schedule was pretested and a few questions were reworded for clarity. The instrument again was pretested and no difficulties were encountered. It was possible to establish the validity of certain factual data used in this study as husbands and wives responded to the same questions, separately.

Questions pertaining to the dependent variables were located in the housing section of the interview schedule whereas the majority of questions pertaining to the independent variables were located in other sections of the retirement schedule.

Definitions

Move. For the present study a move was operationally defined as a change from one residence to another.

Moving intentions. Moving intentions refers to the range of activities individuals can engage in, in the decision-making process regarding a change in residence. These were categorized as follows: never thought of moving, have thought about moving and decided against it, still considering moving, and definitely planning on moving.

Dependent Variables

The dependent variables for this study were 1) extent of moving intentions and 2) reasons for moving. The first dependent variable, extent of moving intentions, was measured by this question:

> 5. When some couples grow older they may make new decisions about where to live. We are interested in learning if you have considered changing your residence any time in the future. Which of the following best describes your thinking?
>
> a. Definitely plan on moving ________________
> When ? ________________________________
> Where? ________________________________
>
> b. Thinking about moving at some time _______
> When ? ________________________________
> Where? ________________________________
>
> c. Have never thought about moving __________
>
> d. Undecided about moving _________________
>
> e. Thought about moving but decided against it ____________________________________
>
> f. Other responses ________________________

The second depedent variable, reasons for moving, was measured by the following question:

> 13. We are interested in your thoughts about a possible change of residence in the future. What kinds of things might cause you to consider a possible move in the future?

Independent Variables

Independent variables were those factors associated with significant changes in the later stages of the life cycle. These independent variables were categorized and the appropriate section in the retirement schedule noted: (see Appendix A, starred questions).

1. Influence of children
    - a. Presence of children at home (Children: 3a)
    - b. Frequency of contact with children (Children: 3b)
2. Work Status
    - a. Occupation (farm/business) (Demographic: first page)
    - b. Retirement (Demographic: first page)
3. Issues related to aging
    - a. Opportunity for contact with social network, specifically children and friends (Social Network: 1a and 1c)
    - b. Importance of contact with social network, specifically children and friends (Social Network: 2a and 2c)
    - c. Health Status (Health: 1)
    - d. Satisfaction with present residence (Housing: 12).

Procedure

Contact with Sample

The sample was purposely selected by referrals from contacts in a number of rural communities and by other study participants. The majority of the farm participants were from central and south-central Alberta while the non-farm participants were from rural communities within a two hour drive of Edmonton. Letters describing the study were sent to prospective sample members. Telephone calls were used to provide additional information and to finalize the interview times.

Training of Interviewers

Interviewers were undergraduate and graduate students at the University of Alberta. All interviewers were trained in interview strategies and techniques by the retirement study project directors. Opportunities for practice were provided. Interviewers were instructed to write a verbatim account of responses when possible.

The Interview

Interview times were arranged by telephone at the convenience of the respondents. In general couples were interviewed in their homes, separately, but concurrently. For some of the non-farm interviews, one or both respondents were interviewed at their place of business. When possible two interviewers participated so husband and wife could be interviewed during the same time period. This writer conducted slightly more than one-fourth of the 98 interviews, talking with both men and women, farm and non-farm participants to minimize interviewer bias.

Each interview took approximately one hour. A summary of the survey results was sent to all participants.

Data Analysis

The data was categorized, coded and keypunched for computer analysis. Crosstabulations were run and two statistical techniques were selected to analyze and assess the data.

Moving Intentions

Goodman and Kruskal's Gamma (G) (Champion, 1970; Mueller, Schuessler and Costner, 1970; Pine, 1977; Nie, et al, 1975:218-219) was used to determine the degree of association between the first dependent variable, moving intentions, and the independent variables. Previous researchers already have indicated factors that were likely to be related to moving intentions so a statistic to measure the strength of these relationships was justified. Gamma, because it is a proportional-reduction-in-error measure, is considered to be one of the most useful and easily interpreted measures of association between two ordinal-level variables (Champion, 1970). Gamma values of ± .70 or higher represent a very strong association, ± .50 to .69 a substantial association, ± .30 to .49 moderate association, ± .10 to .29 a low association and levels below ± .10, a negligible association (Pine, 1977:166).

Although gamma can be used with any size table as long as the variables are ordinal level, gamma does not accurately measure association if these are contradictory trends within the ordering of variables (Mueller, Schuessler and Costner, 1970; Handel, 1978). When this is a possibility, variables are frequently dichotomized and gamma again used to assess the relationship. The dependent variable in this case was collapsed into two categories: never thought of moving and have considered moving at some time. For each independent variable, two tables will be presented: one depicting the full range of moving intentions and the second as the dichotomized expression.

Measures of association can be subjected to a test of significance (Handel, 1978:321). Level of significance was set at $\leq .05$ for this study.

Reasons for Moving

Chi square (x^2) (Champion, 1970; Nie, et al, 1975) was the statistical technique selected for analyzing the other dependent variable, *reasons for moving*, to determine if differences in occupation existed among individuals on reasons for considering a future move. Almost 80 individuals gave reasons for moving. As *reasons for moving* logically could not be collapsed into less than the five categories presented, expected cell size was less than five in some instances. When the expected cell frequency is less than five, chi square value is inflated, overestimating the possibility that the observed frequencies are significantly different from what would occur by chance. Therefore reporting of a statistically significant relationship was inappropriate in this instance.

CHAPTER V

RESULTS

This chapter reports the results of the crosstabulations and analysis for the two dependent variables. The first set of tables (1 through 13) presents the percentage and frequency distributions and gammas for the dependent variable, moving intentions, and the independent variables, factors associated with the later periods of the life cycle. As noted in the preceding chapter, analysis for the first dependent variable, moving intentions was conducted in two phases: as a four point expression of moving intentions and as a dichotomous variable. Although both tables are presented, only the statistical association (gamma) and the level of significance for the dichotomized dependent variable will be reported. These tables are starred.

For the second dependent variable, reasons for moving, Table 14 presents the percentage and frequency distribution of the independent variable, occupation.

Moving Intentions

Influence of Children

1. Children at home (Prediction 1.1)

TABLE 2

Extent of Moving Intentions by Children at Home

	Presence of Children		
Moving Intentions	Absent	Present	
Have never thought about moving	54.1% (33)	29.7% (11)	44.9% (44)
Thought about moving but decided against	13.1% (8)	27.0% (10)	18.4% (18)
Still considering moving	26.2% (16)	27.0% (10)	26.5% (26)
Definitely planning on moving	6.6% (4)	16.2% (6)	10.2% (10)
	62.2% (61)	37.8% (37)	100.0% (98)

* TABLE 3

Moving Intentions by Children at Home

	Presence of Children		
Moving Intentions	Absent	Present	
Have never thought about moving	54.1 % (33)	29.7% (11)	44.9% (44)
Have considered moving	45.9% (28)	70.3% (26)	55.1% (54)
G = +.472 p = .033	62.2% (61)	37.8% (37)	100.0% (98)

There is a moderate association between having children at home and having considered moving.

2. Contact with children (Prediction 1.2)

Only 6.1% of this sample reported less than weekly contact with their children. Therefore contact with children was not considered as a variable..

Work Status

1. Occupation (Prediction 1.3)

TABLE 4

Extent of Moving Intentions by Occupation

	Occupation		
Moving Intentions	Business	Farm	
Have never thought about moving	44.0% (22)	45.8% (22)	44.9% (44)
Thought about moving but decided against	28.0% (14)	8.3% (4)	18.4% (18)
Still considering moving	28.0% (14)	25.0% (12)	26.5% (26)
Definitely planning on moving	0.0% (0)	20.8% (10)	10.2% (10)
	51.0% (50)	49.0% (48)	100.0% (98)

* TABLE 5

Moving Intentions by Occupation

	Occupation		
Moving Intentions	Business	Farm	
Have never thought about moving	44.0% (22)	45.8% (22)	44.9% (44)
Have considered moving	56.0% (28)	54.2% (26)	55.1% (54)
G = -.037 p = .984	51.0% (50)	49.0% (48)	100.0% (98)

There was no significant association between being a member of the farm group and having considered moving.

2. Retirement Status (Prediction 1.4)

TABLE 6

Extent of Moving Intentions by Retirement Status

	Retirement Status		
Moving Intentions	Retired	Preretired	
Have never thought about moving	60.0% (30)	29.2% (14)	44.9% (44)
Thought about moving but decided against	20.0% (10)	16.7% (8)	18.4% (18)
Still considering moving	16.0% (8)	37.5% (18)	26.5% (26)
Definitely planning on moving	4.0% (2)	16.7% (8)	10.2% (10)
	51.0% (50)	49.0% (48)	100.0% (98)

* TABLE 7

Moving Intentions by Retirement Status

	Retirement Status		
Moving Intentions	Retired	Preretired	
Have never thought about moving	60.0% (30)	29.2% (14)	44.9% (44)
Have considered moving	40.0% (20)	70.0% (34)	55.1% (54)
G = +.569 p = .004	51.0% (50)	49.0% (48)	100.0% (98)

Being preretired has substantial association with having considered moving.

Issues Related to Aging

1. Health Status (Prediction 1.5)

Since only 11.3% (n = 11) reported their health was poorer than others their age, health status was not considered as a variable.

2. Satisfaction with housing (Prediction 1.6)

Only one individual reported being dissatisfied with his/her present housing situation. Therefore, satisfaction with housing was not considered as a variable.

3. Availability and Importance of a Social Network (children and friends) (Prediction 1.7).

a. Opportunity to see children.

TABLE 8

Extent of Moving Intentions by Opportunity to See Children

	Amount of Opportunity		
Moving Intentions	Little opportunity	Much opportunity	
Have never thought about moving	20.0% (3)	46.8% (36)	42.4% (39)
Thought about moving but decided against	6.7% (1)	22.1% (17)	19.6% (18)
Still considering moving	53.8% (8)	22.1% (17)	27.2% (25)
Definitely planning on moving	20.0% (3)	9.1% (7)	10.9% (10)
	16.3% (15)	83.7% (77)	100.0% (98)

* TABLE 9

Moving Intentions by Opportunity to See Children

	Amount of Opportunity		
Moving Intentions	Little opportunity	Much opportunity	
Have never thought about moving	20.0% (3)	46.8% (36)	42.4% (36)
Have considered moving	80.0% (12)	53.2% (41)	57.6% (53)
G = -.557 p = .104	16.3% (15)	83.7% (77)	100.0% (98)

There was no significant negative association between opportunity to see one's children and having considered moving.

b. Opportunity to see friends.

TABLE 10

Extent of Moving Intentions by Opportunity to See Friends

	Amount of Opportunity		
Moving Intentions	Little opportunity	Much opportunity	
Have never thought about moving	34.5% (10)	40.3% (34)	44.9% (44)
Thought about moving but decided against	13.8% (4)	20.3% (14)	18.4% (18)
Still considering moving	41.4% (12)	20.3% (14)	26.5% (26)
Definitely planning on moving	10.3% (3)	10.1% (7)	10.2% (10)
	29.6% (19)	70.4% (89)	100.0% (98)

TABLE 11

Moving Intentions by Opportunity to See Friends

	Amount of Opportunity		
Moving Intentions	Little opportunity	Much opportunity	
Have never thought about moving	34.5% (10)	49.3% (34)	44.9% (44)
Have considered moving	65.5% (19)	50.7% (35)	55.1% (54)
G = -.297 p = .265	29.6% (29)	70.4% (69)	100.0% (98)

There was no significant negative association between opportunity to see one's friends and having considered moving.

c. Importance of seeing children.

Only 10.5% of this sample reported that it was not very important to see their children. Therefore, importance of seeing children was not considered as a variable.

d. Importance of seeing friends.

TABLE 12

Extent of Moving Intentions by Importance of Seeing One's Friends

Moving Intentions	Amount of Importance Little importance	 Much importance	
Have never thought about moving	37.8% (14)	49.2% (30)	44.9% (44)
Thought about moving but decided against	8.1% (3)	24.6% (15)	18.4% (18)
Still considering moving	37.8% (14)	19.7% (12)	26.5% (26)
Definitely planning on moving	16.2% (6)	6.6% (4)	10.2% (10)
	37.8% (37)	62.2% (61)	100.0% (98)

* TABLE 13

Moving Intentions by Importance of Seeing One's Friends

Moving Intentions	Amount of Importance Little importance	 Much importance	
Have never thought about moving	37.8% (14)	49.2% (30)	44.9% (44)
Have considered moving	62.2% (23)	50.8% (31)	55.1% (98)
G = -.228 p = .379	37.8% (37)	62.2% (61)	100.0% (54)

There was no significant negative association between expressing importance of seeing one's friends and having considered moving.

Reasons for Moving

Occupation

TABLE 14

Reasons for Moving by Occupation

	Occupation		
Reasons for Moving	Business	Farm	
Maintenance of social network	2.5% (1)	5.1% (2)	3.8% (3)
Attributes of dwelling or location	32.5% (13)	10.3% (4)	21.5% (17)
Opportunities of farm or business	15.0% (6)	0.0% (0)	7.6% (6)
Poor health or effects of aging	42.5% (17)	51.3% (20)	46.8% (37)
Event of Retirement	7.5% (3)	33.3% (13)	20.3% (16)
	50.6% (40)	49.4% (39)	100.0% (79)

Expected cell frequency was less than five for four individual cells, therefore chi square could not be reported.

V

Summary of Results

Prediction 1 (p. 36) which suggested that moving intentions were related to various factors associated with changes in structure and function in later life was confirmed for the presence of children at home and retirement status with a positive association being reported for having children still at home (prediction 1.1) and being preretired (prediction 1.4). Prediction 1 was rejected for contact with children, occupation, health status, satisfaction with one's residence and importance of social networks.

Prediction 2 (p. 37) which suggested significant differences on reasons for moving, based on occupation (farm/business) was rejected.

CHAPTER VI

DISCUSSION AND IMPLICATIONS OF THE STUDY

One purpose of this research was to determine if certain factors related to changes in structure and function of the older family were associated with the moving intentions of a group of older rural residents. The findings indicated that only two factors, having children still at home and not yet being retired, were associated with having considered moving. A second purpose was to determine if the actual reasons individuals gave for considering a future move differed according to occupation. Although a statistical test for significant differences could not be computed due to small expected cell frequencies, the results of the frequency distributions provided an interesting supplement to the data concerning moving intentions.

In the first section of this chapter, a discussion and interpretation of these findings is presented. In the second section, both practical implications of the study and suggestions for further research based on consideration of the model of housing adjustment (p. 16) will be described.

Discussion and Interpretation of Results

This discussion is based on a consideration of factors earlier reviewed and thought to influence the moving intentions of older people. Independent variables were drawn from these factors and were grouped into three categories which were maintained for purposes of the discussion. These categories were influence of children, work status, and issues related to aging.

As a preface to this discussion, some general findings are presented on the moving intentions and experiences of this study sample in order to establish the relationship of this group of older rural people to the general population of older people.

Extent of Moving Intentions and Experiences of the Sample

Fifty-five percent of this group of older rural residents had considered moving, approximately the same percentage as has been reported for non-rural groups (Goldscheider, 1966; Nelson and Winter, 1976). While similar in this respect, there were some differences to be noted between this group and other older Canadians in terms of their moving activities.

A little over 20% of this group moved in a five-year period compared with 31% of the older Canadian population as a whole (Statistics Canada, 1978). Ninety percent of the moves which occurred were within the same communities or into nearby communities, indicating a more limited spatial context of moves than many older movers experienced (Golant, 1972, 1977). Since the moving intentions and experiences of this group are similar to those of other older people in some respects and different in others, the results of this study will be discussed with the expectation that certain factors associated with moving intentions may have unique implication to this group.

Influence of Children

Children at home. Prediction 1.1 suggested that having children still at home was related to a consideration of moving. There was a moderate association between these two variables. It should be kept in mind that families who still had children at home were likely to be younger and likely to be in the preretired category; this later factor was found to be substantially associated with a consideration of moving.

The individuals in this latter group who have children at home are in the process of launching them from the home. McCarthy (1976) and Yee and Van Arsdol (1977) reported an increase in moving activity at this time. McCarthy suggested changes in space requirements brought on by the change in structure of the family provided an impetus for thoughts of moving. Indeed one woman from this study responded. "We can build our dream house now--not so many rooms to clean or stairs to climb!"

Rossi (1955) and Duncan and Newman (1975) had noted that it was easier to adjust to a surplus of space than to a deficit. Therefore it is interesting to note that 27% of those who have children at home and have considered moving decided against this course of action Table 2). This offers some support for Yee and Van Arsdol's observation that during the phase of child launching, moving is considered but not so many plans are subsequently carried out as at other times in the contracting phase of the life cycle.

Table 3 provides a rather curious set of contrasting figures. While 70% of those with children at home indicated they have considered moving at some time, only 46% of those with no children left at home made similar responses. A natural expectation would be for those with no children currently at home to have considered moving to at least the same extent as those with children at home. It is unlikely that such a radical change in moving intentions would have occurred in this sample over a few years time. It is more likely that once one has considered a move, but abandoned that as a possible course of action, it becomes relegated to the category of "have never thought about moving." If that is so, far more individuals actually consider moving at some point than is reported.

Contact with children. Duvall (1977) suggested maintaining contact with adult children was important. Other researchers (Cleland, 1965; Lansing and Mueller, 1967; Lenzer, 1966) reported that older people undertook moves for "family reasons." Prediction 1.2 suggested that the reporting of infrequent contact with children would be associated with moving intentions. The assumption was made that older people would be more likely to move to maintain contact with their children. However only six percent of those interviewed reported less than weekly contact with their children, confirming Shanas' (1977) study which showed that older people are able to maintain contact with their adult children. For this particular group of older rural residents, who also had indicated that this contact was important to them, moving was not necessary to continue such contact.

This observation is reinforced by the findings in Table 14 which indicated that only 3% cite "maintenance of social network" as a reason for considering a future move. The majority of this sample had children living within a 25-mile radius. Children became for this group not so much a reason for moving as a reason for not moving, or for determining the future location of a possible move.

Role of children in determining the future location of moves. There are two factors associated with every move: the reasons associated with leaving the older residence (pushes) and the reasons for selecting a new one (pulls) (Michelson et al, 1973; Rossi, 1955). The location of one's children serves to act as the "pulls" for many of this sample, determining the location of any future residence.

The majority of the *reasons for moving* (Table 14) have to do with retirement (20.3%) and anticipated poor health or the negative effects of aging (46.8%). These reasons were usually followed by statements such as "Where we would go depends on where the children are."

This group was asked what factors would determine their future location if they were to move. Although only 3% gave "social network (children and friends) as a reason for considering a move (Table 14), 40% cited children and friends as a determining factor in selection of the actual location of their prospective new residence. Fifty-six percent said it was *the* most important factor in determining future location. One man who gave retirement as his reason for considering a future move said, "If the girls all move to the coast, we would consider moving there." For those who had moved recently, 34% indicated that their social network of children and friends did, in fact, determine the *present location* of their residence.

Children as a deterrent to moving intentions. The desire to maintain contact with their adult children and their grandchildren would seem to be a deterrent to prospective moving activities for this group. Approximately 18% directly cited reasons having to do with children and friends as factors for staying in their present residences. A larger segment, 41% gave global responses having to do with emotional attachment to their homes. These responses were frequently accompanied by comments on the importance of their children in their lives. One farm woman further explained her feelings of attachment to her home: "I want to stay to be near the children." A retired farmer who had moved into his local community said of his new place that it was close to family and friends. "Our kids come home whenever they can." His comment reinforces Black's (1977) and Duvall's (1977) suggestion that maintenance of a home base is perceived as an important task by older families. One woman summed up the importance of her family as an anchoring force by her exclamation, "I wouldn't leave my grandchildren for all the tea in China!"

Men as well as women stress the importance of children as being the reasons for remaining in their communities. This appears to be particularly the case when children are involved in taking over the farm or business. One farmer remarked, "If the children take over, we would move to town. If they take over, you don't want to be too far away." Another farmer had not yet retired but had planned for his son's taking over the farm in the future by building a house in the local community. He said he wanted to be close to the farm so he could come out to help. Several business operators had turned their businesses over to their sons or sons-in-law yet wished to be near in order to offer both physical and emotional support.

Summary. The period in which the family undergoes a change in structure in their developmental life cycle by launching their children does appear to be a time when older families consider moving. However, a substantial number do decide against a move during this period as well.

The desire to be near one's children is not given as a reason for moving, but it is not a necessary one for this group as they maintain a high level of contact with their children. These respondents were very much aware that the presence of children (and grandchildren) in the area inhibited moving activity or restricted the spatial context of moves. The issue, perhaps, is not the change in structure created by the children leaving that affects housing needs and expectations, but the accessibility of these children to their parents. When asked to think in terms of a prospective move, the location of that new residence is most often defined in terms of the location of one's children.

Maintenance of contact with adult children is seen as an important developmental task by this group as Black (1976) and Duvall (1977) suggested. The focus of this study was on rural self-employed. An interesting speculation concerns the relationship between this particular group of parents and their children. These children may have been more intimately associated with their parents by nature of their involvement in the family enterprise. Therefore, the desire for contact with adult children may be more of an influence on residential mobility and stability for this particular group of older individuals than for other older people.

Work Status

There were two variables considered under work status: occupation (farm/business) and retirement status. Each will be considered separately.

Occupation. Prediction 1.3 suggested that farmers would be more likely to consider moving than business operators. This was based on the fact that the home and work places of farmers are in the same physical location and that retirement of farmers would in many cases mean moving away from their homes. While there is almost no difference between the farm and business groups with regard to consideration of moving (Table 5), Table 4 shows some interesting distinctions in the decision-making process. Twenty-eight percent of the business group reported they had thought about moving but decided against it while only 8.3% of the farmers responded similarly. All of the 10.2% of the respondents that were definitely planning on moving belonged to the farm group. A similar number from both groups were still thinking about moving. The distinction then lies in continuing the decision-making process in terms of realizing the move. It is the farm group who continue with their plans. It is interesting to note that this is confirmed by the past moving activities of this group; 60% of the past moves that occurred were undertaken by the farm group and 33.3% of the farm group gave retirement as the cause of a future move. Only 7.5% of the business group viewed retirement as a possible cause ((Table 14). For farmers then, the loss of the work role which often means the loss of the home, is a definite factor in considering moving.

Retirement, however, is not viewed as a reason for moving on the part of business operators. They were more likely to cite attributes of dwelling or location as a cause for a potential move (32.5%).

Reasons associated with anticipated poor health or the negative effects of aging were the principle reasons for considering a future move for both occupational groups. For farmers (51.3%), this concern is even more acute than for the business group (42.5%). Farmers and their wives elaborated, by expressing fears of being unable to drive or being too far away from others to receive help. Several farm couples planned to continue living on their farms in retirement, either renting the farm itself or turning it over to their children. They viewed any move only in terms of their inability to get around and their reluctance to be a burden to their families.

Although passing on the family enterprise was more of an issue for farmers than for business operators, both expressed the desire to be available to help their children continue their work. As was discussed in the preceding section, this continued interest in the business or farm served to restrict the distance these families would consider moving. However, the non-farm group was more likely to think in terms of a move of a greater distance. This may also reflect stronger intergenerational ties of farm families to the farm operation.

Retirement. Prediction 1.4 suggested that the status of not having retired is associated with having considered moving. A gamma of +.57 indicated a substantial degree of association between preretirement and the possibility of moving. Loss of the work role is particularly significant in farmers' consideration of moving, as one-third of them indicated that retirement will be the cause of a future move.

There is an interesting difference between the groups in terms of their consideration of moving (Table 5). Almost 71% of the preretired group reported "have considered moving" while only 40% of the retired group claim to have considered this action. Evidently, once a move is considered, then rejected, it becomes easy to dismiss the whole subject and respond, "Have never thought of moving." This would further indicate that more individuals have considered moving at some time than previously thought.

The distinction between the preretired and retired lies in the percentage who are still potential movers (Table 4). Over 50% of the preretired group are either definitely planning a move or are still considering such action while that situation applies to only 20% of the retired group. The preretired group is still in flux in terms of their intentions while the retired group have made their decisions.

Generally only fear of poor health or physical incapacitation prompts the retired group to consider moving (60%). The preretired were more apt to consider a future residence in terms of retirement or features of the dwelling or its location. Many looked forward to moving to a smaller, more convenient place, provided it was near their friends and children. These responses were consistent with the responses of those who still had children present in the home, and preretired couples were more likely to have children at home.

Potential moves on the part of this rural sample which were linked to retirement were not complicated by health or physical problems. Retirement moves for this group were likely to occur in the early 60's when they were still healthy and active. Goldstein (1967) found that moves associated with retirement occurred two to five years before or after retirement. Demographic analysis indicated that this group, on the average, retired before age 65.

Summary. Although both farm and non-farm participants consider moving, it is the farm group which is more likely to continue the decision-making process by planning a move and eventually moving. In addition, retirement is more often cited by farmers as a reason for moving than by business operators and their wives. Both groups, however, offer reasons pertaining to possible poor health or physical incapacitation as being the principle reasons for considering a future move.

Retirement is a real as well as a symbolic time of change: activity patterns, income levels and available time may be affected (Duvall, 1977; Neugarten, 1976). Moving is one result of responding to changes in housing needs and expectations.

Retirement affects the housing needs of farmers in a very direct way. Loss of the occupational role often means loss of the home as well. For the non-farm group; the implication of change is not so clear. There was no dramatic shift in income to promote or prevent a move. Retirement generally was not seen by this group as a symbolic time of new directions. Although no longer working, most continued their preretirement level of activity in the community through valued contacts with family and friends and continued participation in community affairs. Retirement had an effect on the moving intentions of the non-farm group only in that they now had time to realize any long-desired housing goals they had developed through the years.

Issues Related to Aging

Health Status. Prediction 1.5 suggested poor health was associated with a consideration of moving. Health status could not be considered a measurable variable since so few (11.3%) considered themselves in poorer health than other people their age. Although current health status was not a factor in consideration of moving, health is the principle reason cited by both the farm group (51.3%) and the non-farm group (42.5%) for considering a future move (Table 14). This was quite similar to the findings reported by Cleland (1965) in his study of older members of a farm community. Fear of eventual poor health or physical incapacitation rather than present health status is the motivation for considering a future move.

The farm group voiced slightly more concern over health and aging factors. A frequent worry was what would happen when they could no longer drive. This feeling of potential isolation was a factor behind several moves into town. For example, both members of one farm family mentioned they wanted to live closer to shops and doctors and where they didn't have to start the car every day. Another retired farmer mentioned the farm was not a convenient place to live: "Something could happen." The farm group spoke more in fear of what could happen; the non-farm group more in terms of wanting to retain their independence. These articulated concerns supported Morris and Winter's (1978) suggestion that, for the elderly, the impetus for considering an adjustment to their housing situation does come from changes that take place during this stage of the family life cycle. The motivation comes from physical changes that occur or are expected to occur rather than because their housing situation no longer meets certain cultural norms.

Housing satisfaction. Prediction 1.6 suggested dissatisfaction with housing was associated with consideration of moving. Only one individual reported being dissatisfied with his or her present housing situation, yet reasons pertaining to the dwelling or its location were given by 21.5% of the respondents as possible causes for future moves (Table 14). For the business group, this reason (32.5%) was second after health and aging factors, while for the farm group it accounted for only 10.3% of the reasons. Although members of both groups discussed positive features with regard to a prospective new dwelling or location, few ever spoke disparagingly of their present residences. There is an apparent contradiction between satisfaction with present housing yet having considered moving. For many it appeared to reflect the sentiment, "Where we are is fine with us, but maybe we would be better off someplace else (in the future)."

The great attachment of these individuals to their homes was cited as a reason for staying in their present location. However Frances Carp (1976) suggested that "home" means more than just the residence. One retired farmer who had been in his new home (in town) for five years said, "Our friends are right here; our recreation is right here; our interests are here. We are happy here so why not stay. I've lived in this community for 50 years."

Farmers and their wives gave as their chief reason for remaining in their present residence their emotional attachment to their place. "Home" gave them identity and meaning for their lives. The non-farm group responded more in terms of the practical implication of a move.

One farmer said, "This has always been our home." Another commented, "How do you know you would find anything better. I can't imagine living anywhere else."

Some of the responses from the business group were as follows:

"It's too much work and trouble to move."

"It's important to be near services."

"We'd have to see the cost of our present place versus the cost of a new place."

"We're established here. It's more reasonable to stay than to move. The house will be paid for."

Future housing needs were considered by this group of older individuals. Over 60% of the respondents indicated that health and physical changes might result in some type of housing adjustment, ranging from apartment living to lodge accomodations. The majority of this sample viewed this possibility of a move with negative feelings.

Availability and importance of a social network of children and friends. Prediction 1.7 suggested that the availability and importance of a social network of children and friends is negatively associated with a consideration of moving. Although a significant negative relationship could not be reported, there were some interesting trends. Very few respondents reported little opportunity to see their children (Table 9), and even fewer reported that it was not very important for them to see their children (p. 58). For this sample children are of continued importance and there is, in general, ample opportunity for this contact. It is interesting to note that of the 15 individuals who indicated they have little opportunity to see their children, 80% have considered moving.

Only one-third of the group under study reported that they either had little opportunity to see friends or that such contact wasn't very important to them (Tables 11 and 13). More than 65% of those with little opportunity to see friends have considered moving as compared with 50.7% of those with much opportunity to see friends. A similar relationship exists in terms of the importance of this relationship. Of those who say it is of little importance to see one's friends, 62,2% have considered moving while only 50.8% of those who feel it is important to see their friends have considered moving.

Friends, along with children, are part of the social network many older people see as important influences in continuing their present housing arrangements. Although factors such as retirement and concerns over health and aging may be voiced as the reasons for considering a move, it is the social network that determines the future location of the residence, as well as promoting a degree of residential stability. As a retired individual stated: "My friends are here. That's what keeps me here."

Summary. Although functional changes accompanying poor health and physical problems were not associated with a consideration of moving by this group, health and physical problems associated with later stages of the life cycle were identified as the principle reason for a planned future move. Farmers expressed slightly more concern over this issue than did the non-farm group, perhaps due to the greater isolation they may experience on the farm. Though they were healthy and active, responses by this group of older individuals showed they were thinking of the future when they realistically viewed possible physical changes as requiring adjustments to their housing situations.

This group seemed to view their retirement years in two phases as some gerontologists (Neugarten, 1976) have done: a current "young-old" phase where they are able to sustain a high degree of activity and involvement, and a future "old-old" phase requiring radical changes in their living and housing patterns.

Housing is important to this group, not because they are dissatisfied and see this dissatisfaction as a cause for moving, but because they are satisfied. Their satisfaction with their residences goes beyond the physical attributes of the dwelling or its location. The "house" represents memories and a lifetime of familiar people and patterns. As such, the feelings about house and location become deterrents to any present moving activity, given an acceptable state of health and level of physical activity.

The self-employed of this sample have a life-long history of self-reliance and independence. It is not surprising that they wish to remain in their homes as long as possible since maintenance of home is associated with independence in our society (Carp, 1976; Glick, 197).

Children and friends are part of a social network. This social network is important to members of this group and it is seen as a force promoting residential stability. The strong support system of a social network for this group of rural residents may help them to remain in their homes longer than is the case with many other older people. The availability of community support services in rural areas also may determine how successfully they are able to maintain this kind of independence.

Practical Implications of this Study

Practical implications of this study will be discussed in terms of changes in specialized housing needs of rural elderly and support services related to housing.

Changes in Housing Needs

Results from this study have shown that this group of older rural people do consider moving, but few actually make concrete plans to move between ages 50 to 70, years when they are likely to be well and active. Fifty percent have lived in their homes 15 years or more. The majority of this group repeatedly stressed their desire to stay in their homes as long as possible. Independent living is highly valued by this group, as it is for most older people. Morris and Winter (1978: 212) raised a cautionary note. The fact that older households are far less likely to move than younger households is not a necessarily good indicator of whether their housing needs are being met. A couple's deep attachment to house and location or their difficulty in selling an older rural dwelling may act as constraints on potential moving activity.

A consultant in the Alberta Senior Citizens' Bureau reported that older rural persons in Alberta were remaining in their homes longer, as this research would suggest. There are more options and services available to allow them to continue in their homes although the quantity and quality of these services varies throughout rural Alberta.

The trend for older people to continue independent living until advanced ages has been reflected in the changing housing situation for the rural elderly. For the first time in many years, rural lodges are experiencing vacancies instead of waiting lists. The concern is that this situation will, in time, be reflected in an increased demand for more specialized housing for the frail elderly.

Specialized housing for seniors such as lodges was considered a future possibility for two-thirds of this group, although over 60% viewed these types of housing options as negative choices. Fear of loss of independence and a reluctance to change habits were frequently cited as reasons for not wanting to live in "those kinds of places." Attitudes such as these have implications for the kinds of support services designed to help older people remain living independently, and their various uses.

Support Services Related to Maintaining Indpendent Housing Situations

The last interview this writer conducted was with a 50-year old farm woman who was very articulate in her concern that services should be available to allow older rural people to remain in their homes if they wished. She listed the need for Home Care Services and Homemaker Services which are available in some rural areas. However, she noted that transportation was one of the biggest worries facing many older rural individuals. Certainly this worry was repeated by many of the farm respondents in this study.

There is a program available that offers some assistance in terms of transportation. A two-dollar per capita grant for towns and villages is available from the Department of Transportation for transportation services for the elderly and handicapped. However it is up to the local districts to augment these services. Some communities have used the funds to subsidize taxi services. Other districts have been given a mini-bus by a local service organization and have used the money for operation of the vehicle to provide transportation for the elderly and handicapped.

Application of the Model with Suggestions for Further Research

This research offered some support for the model of continued evaluation of housing needs and expectations, a model which was focussed on a change of residence as the method adjustment (p. 16). However, there are aspects of this model that could be further elaborated and from which suggestions for additional research might be developed.

The results of this study suggested that there is a relationship between certain factors associated with changes in structure and function that occur in the later stages of the family life cycle (Condition B) and consideration of moving (E_1). However the links between these two conditions are not entirely clear.

Morris and Winter (1978) theorized that if housing arrangements did not meet the needs of the family, certain deficits in the housing arrangement would become apparent, causing dissatisfaction. This feeling of dissatisfaction would prompt some form of housing adjustment ($B \rightarrow C \rightarrow D$). Virtually all the participants in this study professed to be satisfied with their residences. One might infer that their housing needs were being met. Yet half had considered a move. However, many of those who had considered moving appeared to do so in terms of a projected future situation. This would account for many of the responses of those who expressed satisfaction with present residence (Condition C -- Needs and Expectations Met by Present Housing Arrangement → Yes) but still considered a change of residence (E_1). This model does not adequately distinguish between consideration of moving based on present housing needs or on future needs.

Although a global measure of housing satisfaction was obtained for this group, an evaluation of various aspects of dwelling and location was not attempted. Therefore, it is difficult to determine what, if any, deficits may have produced the feeling that present or future needs and expectations regarding housing were not going to be met (Condition C → No). The area suggested by Condtion C as it applies to older rural families in particular should be clarified by further study. Certainly the most frequently reported housing deficits for most families, additional space needs and desire for home ownership (Michaelson et al, 1975; Rossi, 1955; Speare, 1974) are not applicable to this group. Montgomery (1980:447) suggested that for older couples three highly valued housing norms of North American culture had already been met. These pertained to home ownership of a single family dwelling and independent living. These norms were met by this group. The results from this present study would suggest that specific housing and neighborhood deficits would be more likely tied to a sense, or fear, of diminishing physical capabilities plus the desire to maintain close contact with a social network of family, friends and community.

Closer study of these specific housing needs and expectations also should reveal the extent to which deficits are based on perception of future needs. Although Morris and Winter (1978:69) recognized anticipatory housing adjustment; perhaps for some older families, planning for eventual needs is more extensive than previously thought. Certainly Keating and Marshall (1980:441) found planning for future needs--retirement income and use of time--was part of the philosophy of this group of rural self-employed.

Another aspect of the model that could be clarified is Condition D (Adjusts Housing Situation to Meet Needs and Expectations). Morris and Winter (1980:76) suggested that in order to adjust one's housing situation, a family's first preference would be to change residences. They did recognize (p. 76-77) that farm families would be less likely to move than non-farm families and that home owners may prefer to remodel than to move. Older families may be subjected to more constraints than would younger families. Factors such as their deep attachment to residence and location, income considerations and strong social ties might influence older families to select some mode of adjustment other than moving. No attempt was made in this study to determine if a change of residence was the first or the only method of housing adjustment that this group had selected. Considering the voiced relectance to move, one might suggest that many older rural families modify their housing norms as their way of adjustment.

Further examination of the model suggests one other area that should be elaborated. Conditions E_1 through G_1 describe that part of the decision-making process from continued thinking about a prospective move to the actual move. Over half of the older people in this study had considered moving at some time, but only 10% had definite plans to move. From the past behavior of this group, one could project that about 8% will eventually move. The questions should be raised as to what constraints operate that may deter a family from realizing a move. Are these constraints different for older rural families? Over one-third of those who had considered moving had decided against such action. This study did not expore this respose further.

Although sections of this model should be clarified and elaborated, it has been useful as a guide for examining how changes that occur in the lives of older families may affect their evaluation of their housing situation, motivating them to consider moving to another residence. Further study along the lines suggested above would provide a clearer picture of why some older families move or don't move and the impact this might have on their lives.

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APPENDIX: A

LETTER TO PROSPECTIVE FARM SAMPLE

403 · 432-3824

FACULTY OF HOME ECONOMICS

THE UNIVERSITY OF ALBERTA · EDMONTON, CANADA · T6G 2M8

We read a lot today about retirement and its' special problems and leasures: when to retire; what sources of retirement income should people expect; what to do with one's time; how to find satisfying alternatives to work. There is currently a senate committee headed by Senator David Croll which is travelling across the country listening to briefs concerning retirement age. Senator Croll recently said that he thinks that Canada will soon make it illegal for a company to force an employee to retire before the age of 70.

It's encouraging to see that in Canada we have finally come to realize that most people will retire from work and that individuals should have something to say about the timing of their retirement. But what of those people whose occupation is farming? There is no mandatory retirement age, no company pension plan, no opportunity to merely clean out one's desk and close the door.

We in the Family Studies Department at the University of Alberta are interested in talking to farm families (husbands and wives) about retirement. Do farmers ever retire? Does retirement usually mean selling the farm or passing it along to the next generation? How do you decide when to retire? Do farm wives ever retire?

We would appreciate your assistance in helping us with this project. An interviewer who is a student at the University of Alberta would like to talk to each of you (husbands and wives) for approximately one hour. He or she will record your discussion and return it to us. Your responses will be read only by the researchers and any discussion of our findings will in no way be identified with you. We would like to talk with you in your home at a convenient time between January and March. We hope this might be an interesting diversion for a cold winter evening.

People we would like to involve in this project are married couples whose main occupation is farming (or was farming if you are retired), and where the husband is between 50 and 70 years of age. If you are willing to be involved, please complete the attached information sheet and return it to us. Thank you for helping us find out the process of retirement of a large number of Albertans.

Sincerely,

Norah Keating &
Judith Marshall,
Assistant Professors,
Division of Family Studies,
901 General Services Building.

APPENDIX: B

LETTER TO PROSPECTIVE BUSINESS SAMPLE

FACULTY OF HOME ECONOMICS
THE UNIVERSITY OF ALBERTA • EDMONTON, CANADA • T6G 2M8
403 • 432 • 3824

We read a lot today about retirement and its' special problems and pleasures: when to retire; what sources of retirement income should people expect; what to do with one's time; how to find satisfying alternatives to work. There is currently a senate committee headed by Senator David Croll which is travelling across the country listening to briefs concerning retirement age. Senator Croll recently said that he thinks that Canada will soon make it illegal for a company to force an employee to retire before age 70.

It's encouraging to see that in Canada we have finally come to realize that most people will retire from work and that individuals should have something to say about the timing of their retirement. But what of those people who are self employed? There is no mandatory retirement age, no company pension plan, no opportunity to merely clean out one's desk and close the door.

We in the Family Studies Department at the University of Alberta are interested in talking to self-employed couples about retirement. How do you decide when to retire? Is retirement abrupt, or a gradual process of working fewer and fewer hours? Do woman ever retire?

People we would like to involve in this project are married couples who are self employed and in which the husband is between 50 and 70 years of age. Wives may be involved in the family business but do not ordinarily work at other paid employment for more than 10 hours per week.

We would appreciate your assistance in helping us with this project. An interviewer who is a graduate student at the University of Alberta would like to talk to each of you (husbands and wives) for approximately one hour. She will record your discussion and return it to us. Your responses will be read only by the researchers and any discussion of our findings will in no way be identified with you. We would like to talk with you in your home or place of business at a convenient time within the next month. The interviewer will be calling you in the next week to discuss this with you.

In anticipation of your involvement in this project we would like to thank you for helping us find out about the process of retirement of a large number of Albertans.

Sincerely,

Norah Keating &
Judith Marshall,
Assistant Professors,
Division of Family Studies,
801 General Services Building.

APPENDIX: C

INTERVIEW SCHEDULE

PROCESS OF RETIREMENT

* PRE RETIRED QUESTIONNAIRE

Sex: Male ______________ Female ___________

Ask Men:

1. At what age do you expect to retire from farming/your business?
   _________ years of age _________ have not decided
2. What do you think will be your primary reason for retirement?
   ____
   ____

Ask Women:

1. When do you expect to retire? (probe for comments)
   ____
   ____
2. What do you think will be your primary reason for retirement?
   ____
   ____

Ask everyone:

3. How old are you now? _________ years old
4. What is the highest level of education you have attained?

less than 8 years	________	Graduate degree	________
10 - 12 years	________	Other post high school training	________
Some university	________	Other	________
University degree	________		

5. In what country were you born? ____________________
   If other than Canada, at what age did you immigrate to Canada?
   _________ years of age

* 6. **Business People**

What kind of business do you have?
____
____
____

Farm People

What type of farm do you operate?
1. Dairy ________
2. Grain ________
3. Mixed ________
4. Ranching ________
5. Other ________

7. How will you and your husband/wife decide when to retire?
   ____
   ____

MARRIAGE

For married couples, thinking about retirement often involves both people.

1. We would like to know whether you and your wife/husband have talked bout retirement?

   yes ______ (ask questions 2 and 3) no ______ (go to to question 4)

2. When did you and your spouse first talk about retirement?

   ____

   ____

3. What did you talk about?

   ____

   ____

4. Do you have any thoughts or concerns about retirement that you haven't shared with your spouse?

   Yes ______ (ask question 5) no ______ (go on to question 6)

   ____

5. What do you think you'll do about those concerns? (Probe for why.)

   ____

   ____

Ask Women:

6a. Many women feel responsible for helping their husband's through the retirement process. Is this true for you? If yes, what have you done about it?

   Yes _______ no ______

   ____

   ____

Ask Men:

6b. Many women feel responsible for ehlping their husband's through the retirement process. Have you noticed that your wife has done any think to help you through the retirement process? Please explain.

   ____

   ____

Ask Men and Women:

7. Many couples find that after the husband retires the couple spend more time together. This can be a mixed blessing. What has been your experience?

   ____

   ____

CHILDREN

Often by the time people think about retirement, their children are grown. However, children usually continue to have some influence on their parents' lives. We would like to know some things about your children.

1. How many children do you have? ___________ (exact number).

2. What are their ages and marital status?

	Name	Age of Child	Sex	Single	Married	Separated or Divorced	Remarried
1,							
2,							
3.							
4.							
5.							
6.							

Ask questions 3a, 3b, 3c for each child in turn. Use additional sheets.

* 3a. Where does ____________________ live? (Insert name of child)

Same household	Same property	Within 1 mile	Within 5 miles	More than 5 miles (state how far)

* 3b. How often do you have contact with ______________?
Check appropriate column for each of 3 categories

	In person	By phone	By mail
Daily			
3 times/week			
Weekly			
2-3 times/month			
Less than 2 times per month (state how often)			

3c. Who initiates contact between you and __________________?

Parent always	Child always	Parent always	Child usually	about equal	Child lives home

Comments: ____

4. Are your children involved in your planning or thinking about retirement?
Yes _________ (ask question 5) No __________

5. How are they involved?

____

____

SOCIAL NETWORK

We would like to know something about the relative importance of various people in your life and activities in which you are involved. We would also like to know about the opportunities you have to see people and and be involved in activities. For example, it might be very important to you to see your children, but you have little opportunity to see them because they live in Halifax.

I am going to give you two checklists. One the first checklist I would like you to indicate how much opportunity you now have to engage in each of the activities.

On the second list I would like you to indicate how important it is to you now to engage in the same activities.

(Give interviewee checklists 1 and 2 to complete.

CHECKLIST 1: Please circle the number opposite each statement that best describes your present situation.

How much opportunity do you have now:	Unlimited opportunity	A great deal of opportunity	Some opportunity	Little opportunity	No opportunity
* 1. a. To see your children?	5	4	3	2	1
b. To see other relatives?	5	4	3	2	1
* c. To see your friends?	5	4	3	2	1
d. To make new friends?	5	4	3	2	1
e. To see former workmates?	5	4	3	2	1
f. To belong to clubs?	5	4	3	2	1
g. T develop new hobbies?	5	4	3	2	1
h. To go to church?	5	4	3	2	1
i. To choose the neighbourhood in which you'd like to live?	5	4	3	2	1

CHECKLIST 2: Please circle the number opposite each statement that best describes your feelings now.

How important is it to you now?	Extremely important	Very important	Somewhat important	Of little importance	Not important at all
* 2. a. To see your children?	5	4	3	2	1
b. To see other relatives?	5	4	3	2	1
* c. To see your friends?	5	4	3	2	1
d. To make new friends?	5	4	3	2	1
e. To see former workmates?	5	4	3	2	1
f. To belong to clubs?	5	4	3	2	1
g. To develop new hobbies?	5	4	3	2	1
h. To go to church?	5	4	3	2	1
i. To choose the neighbourhood in which you'd like to live?	5	4	3	2	1

Did you mark any categories where you do not presently have as much opportunity as you would like to do things or see people that are important to you?

Yes _____ (what prevents you from being involved?) No _____

____

MONEY

We are interested in families' ideas about retirement and money income.

1. Have you done any thinking about your money income in retirement?

Yes ______ (ask questions 2 through 6) No ____ (go to question 7)

2a. When did you begin thinking about this? ______ years ago.

Comments: ____

____

b. What led you to begin thinking about this?

____

____

3. What were the first plans you made for providing money income in retirement?

____

____

4. Have you added to or changed these plans since then?

Yes ______ No ______

5. If yes, please explain what changes you made and when you made them.

____

____

____

6. Have you taken action on these plans?

Yes ________

No ________

If yes, ask: What action did you take and when did you take it? For example, if you planned to establish a savings account for retirement, did you do it, when did you do it?

____

____

____

Ask question 7 if they said No to question 1.

7. If no, when do you think you will begin planning for your income provision in retirement?

____

____

____

Checklist 2A

Ask Everyone

8. What do you think your gross couple income will be the year after you retire?

1. Less than 9,999 ________
2. 10,000 to 14,999 ________
3. 15,000 to 19,999 ________
4. 20,000 to 24,999 ________
5. 25,000 to 29,999 ________
6. 30,000 to 34,999 ________
7. 35,000 to 39,999 ________
8. 40,000 to 44,999 ________
9. 45,000 to 49,999 ________
10. 50,000 to 54,999 ________
11. 55,000 to 59,999 ________
12. 60,000 to 64,999 ________
13. 65,000 to 69,999 ________
14. 70,000 to 74,999 ________
15. 75,000 to 79,999 ________
16. 80,000 to 84,999 ________
17. 85,000 to 89,999 ________
18. 90,000 to 94,999 ________
19. 95,000 to 99,999 ________
20. Over 100,000 ________
21. Don't Know ________
22. No answer ________

9. What is your present gross couple income?

1. Less than 9,999 ________
2. 10,000 to 14,999 ________
3. 15,000 to 19,999 ________
4. 20,000 to 24,999 ________
5. 25,000 to 29,999 ________
6. 30,000 to 34,999 ________
7. 35,000 to 39,999 ________
8. 40,000 to 44,999 ________
9. 45,000 to 49,999 ________
10. 50,000 to 54,999 ________
11. 55,000 to 59,999 ________
12. 60,000 to 64,999 ________
13. 65,000 to 69,999 ________
14. 70,000 to 74,999 ________
15. 75,000 to 79,999 ________
16. 80,000 to 84,999 ________
17. 85,000 to 89,999 ________
18. 90,000 to 94,999 ________
19. 95,000 to 99,999 ________
20. Over 100,000 ________
21. Don't Know ________
22. No answer ________

10. What will be the major source of your retirement income?

Sale of business/farm ________

Savings ________________

Other (Please specify) ________________________________

____

11. Do you think that your retirement income will be adequate to live the way you want to? (Probe for changes in spending patterns)

Yes ________

No ________

Comments: ____

____

TIME

In our society, work takes up many hours of the day. When a person retires many of those hours that were previously used in work are freed up to be used in other ways. One of the things we are interested in, in this study, is when families begin thinking about and preparing for how they will use this time. Some families don't make any plans for it until they actually retire, while others think about it a long time in advance.

We would like to talk with you about what you think about retirement and time.

1. Have you done any planning or thinking about how you will use your time in retirement?

   Yes ______ (ask questions 2 through 5) No ____(go to question 6)

2a. When did you first begin thinking about this? ______ years ago.

Comments: ____

____

b. What led you to begin thinking about this?

____

____

3. What ideas did you have at that time, for time use in retirement?

____

____

4. Have you done any further planning for time use in retirement or have you you changed your ideas since your first began thinking about it?

   Yes ______ No ______

5. If yes, please tell me about any changes or further planning that you have done. When did you do this?

____

____

Ask question 6 if they said No to question 1.

6. If no, when do you plan to begin thinking about how you will use your time in retirement?

____

____

No plans at present ______________________________

Ask everyone:

CHECKLIST 3

I am going to give you a list of several activities. I would like you to rank the activities from 1, the one you do the most, to 11, the one you do the least. If you do not engage in an activity at all, write NA beside it. I would also like you to rank the activities from high to low according to those you enjoy most to least.

	Please rank the following activities from the one you do most (#1) to the one you do least (#11). If you do not engage in an activity, write NA beside it.	Please rank the following activities from the one you enjoy most (#1) to the one you enjoy the least (#11). (Please rank all activities)
Television		
Cultural events		
Organized clubs		
Visiting friends & relatives		
Individual hobbies		
Volunteer/Community work		
Travelling		
Religious activities		
Work (at paid employment)		
Housework		
Shopping		

7. In what ways do you think that your use of time will change when you retire?

8. How do you feel about those changes?

HEALTH

We'd like to know something about the state of your health.

* 1. In general, would you say that your health is better, about the same, or worse than most people of your age?

better ______ about the same ______ worse ______

Comments: ______

2. Has the state of your health affected your retirement plans?

yes ______ No ______ Undecided ______

If yes, how are your plans affected?

HOUSING

We would like to talk with you about where you live,

1. Do you rent or own your home?

   Own ______ Rent ______

   Other responses ________________________________

   If own, ask:

   Are you paying off a mortgage?

   Yes ______ No ______

   Other responses ________________________________

2. How long have you live here? ________ (exact number of years)

3. How many times have you changed your residence since you have been married?

   __________ (exact number of times)

4. How many times have you changed your residence since age 45?

   __________ (exact number of times)

CHECKLIST 4

Give interviewee checklist 4 to read, but interview marks choice.

5. When some couples grow older they may make new decisions about where to live. We are interested in learning if you have considered changing your residence any time in the future. Which of the following best describes your thinking?

   a. Definitely plan on moving ________________________

      When? ____________ Where? ________________

   b. Thinking about moving at some time ________________

      When? ____________ Where? ________________

   c. Have never thought about moving ________________

   d. Undecided about moving ____________________

   e. Thought about moving but decided against it ____________

   f. Other responses ________________________

Ask of everyone but those who indicated 5a. (definitely plan on moving)

6. Can you share any thoughts with us as to why you might choose to remain in your present residence? (Probe for comments)

   ____

   ____

   ____

If respondent indicated 1 or more moves since age 45 (question 4), ask questions 7 through 11.

7. Why did you decide to move from your last residence?

____

____

Where was it located? ________________________

If respondent has not indicated retirement was a factor in deciding to move ask:

8. Was retirement a factor in any of your moves?

Yes ______(ask question 9) No ______(go to question 10)

9. In what way was retirement a factor in your decision to change residence?

____

____

10. What factors were important to you in determining where you live now?

____

____

11. In making your last move, did you consider any of these types of living arrangements?

Apartment __________ Condominium __________

Single family home. Rent ______ Own __________

Share home with other family members (who) ____________

Senior citizens' housing (type) ________________

Any other responses ____________________

* 12. How satisfied are you with your present residence?

Very satisfied ____________________

Satisfied ____________________

O. K. ____________________

Dissatisfied ____________________

Very dissatisfied ____________________

Ask everyone:

13. We are interested in your thoughts about a possible change of residence in the future. What kinds of things might cause you to consider a possible move in the future? (Probe)

____

____

Interviewer: If respondent indicates not moving under any circumstances, please don't probe further.

What factor would be most important?

____

14. If interviewee has not indicated retirement as a factor in future moves, ask: Would retirement be a factor in your decision?

Yes ________ No ________

Comments: ______________________________

____

15. If you did decide to move, we are interested in learning what factors would be important to you in deciding where to live?

____

____

Which factor would be most important to you?

____

16. If you were to move, would you consider any of these types of living arrangements?

Apartment ____________ Condominium ____________

Single family home Rent ________ Own ____________

Share home with other family members (who) ____________

Senior citizens' housing (type) ____________

Any other responses ____________

Which would be most preferable to you?

____

LIFE STISFACTION

We would like to know something of your present feelings toward life in general. After each of the following stagements, please check the column that is closest to your feelings.

	AGREE	DISAGREE	DON'T KNOW
1. As I grow older, things seem better than I thought they would be.			
2. I have gotten more of the breaks in life than most of the people I know.			
3. This is the dreariest time of my life.			
4. I am just as happy as when I was younger.			
5. My life could be better than it is now.			
6. These are the best years of my life.			
7. Most of the things I do are boring or monotonous.			
8. I expect some interesting and pleasant things to happen to me in the future.			
9. The things I do are as interesting to me as they ever were.			
10. I feel old and somewhat tired.			
11. I feel my age, but it does not bother me.			
12. As I look back on my life, I am fairly well satisfied.			
13. I would not change my past life even if I could.			
14. Compared to other people my age, I've made a lot of foolish decisions in my life.			
15. Compared to other people my age, I've made a good appearance.			

	AGREE	DISAGREE	DON'T KNOW
16. I have made plans for things I'll be doing a month or a year from now.			
17. When I think back over my life, I didn't get most of the important things I wanted.			
18. Compared to other people, I get down in the dumps too often.			
19. I've gotten pretty much what I expected out of life.			
20. In spite of what people say, the lot of the average man is getting worse, not better.			